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JISC Building Capacity Programme

CRMS Case Study

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1.0 Project Information

Project Title – Building Capacity Programme, Teesside University

Project Director – Prof Cliff Hardcastle, Deputy VC, Research & Enterprise

Project Manager – Karen Race, Deputy Director, Academic Enterprise

2.0 Project Description

2.1 Background

Teesside University has been delivering innovative education to learners for 80 years, and currently supports more than 29,000 full and part time students. With almost 2,300 members of staff, Teesside is recognised as one of the top UK universities for widening participation in education.

Named Times Higher University of the Year for 2009/2010, as well as winning Outstanding Employer Engagement Initiative of the Year, the University has developed an international reputation for excellence in enterprise.

The University's Client Relationship Management System (CRMS) was implemented in 2008. It uses Microsoft Dynamics software, fully integrated with Outlook to support effective management of business contacts.

The system was customised in response to existing University strategy and business engagement procedures, with a view to developing additional policies to improve and develop business interaction. Furthermore it would facilitate the achievement of the 'Putting the Customer First' quality standard, which four of the University's business-facing units achieved in 2010.

2.2 Project Detail

At the outset of the project, Teesside University was at the forefront of adopting customer relationship systems to support business engagement in the HE sector. Already two years into its CRMS implementation, many barriers had been overcome. However usage of the system for Marketing and initial engagement of business customers was still to be addressed.

The project involved addressing technical, cultural and organisational issues to engage more of the University in using the CRMS and produce high quality, timely and effective e-marketing campaigns. The JISC funding was used to address the wider institutional barriers at the same time as implementing new software.

An external supplier provided a Marketing bolt-on to the existing CRMS. This additional functionality included:

- **E-Marketing software** – the ability to produce fully branded email communications to form carefully targeted and integrated marketing campaigns
- **Email templates** – a suite of html email templates tailored for different Schools, purposes and audiences, to ensure the quality and consistency of Marketing activity
- **Book and pay online** – the facility for email recipients to register and pay for events/courses online via a link within the email communication
- **Automatic CRMS population** – the capability to capture new data (i.e. event registrations and contact records) and automatically enter them into the CRMS
- **Campaign reports** – the ability to produce post-campaign analysis, including numbers of reads, responses, registrations and related website clicks

As part of the project, the University produced a suite of CRMS policies, processes and practices, with a view to sharing them amongst other HEIs. This was launched as a business toolkit at a dissemination event which was attended by over 50 external organisations, HE / FE institutions and other stakeholders.

A second element to the project was increasing the awareness of JISC internally, because prior to the work undertaken, engagement with JISC was fragmented and responsive. The aim was to change this relationship to be more strategic and proactive, enabling the University to review and implement JISC tools and maximise any funding opportunities for future projects.

2.3 Key People

The project was planned and executed by the Project Manager in consultation with the Project Director. Other members of the project team included the University's Quality Manager for Employer Engagement, the Senior CRM Analyst and a Research Assistant.

2.4 Purpose of the Project

The objectives of the project can be broken down into two key elements:

a) Exploiting the CRMS for Business & Community Engagement (BCE)

- To produce a suite of policies and business processes to be used by other HEIs in order to exploit business-to business marketing opportunities and to facilitate the use of CRM
- To evidence the benefits CRM brings to the effectiveness and efficiency in HEI business engagement and in methodologies for evaluating Marketing campaigns
- To create a practical demonstration site, encouraging visits from other HEIs interested or engaged in developing CRM-based approaches to business engagement

b) Promoting JISC at Teesside University

- To increase awareness of JISC internally and how JISC outputs and services can address strategic objectives
- To report on the most pressing needs within the institution that the project will address
- To review JISC projects and services and align them with strategic objectives
- To embed processes to monitor opportunities for JISC funding, materials, events and support

2.5 Methodology

In order to address the objectives set out in section 2.4, the University followed a structured methodology comprising a number of key stages.

- a) **Desk-based research** – the first stage was to undertake a period of research on JISC projects to enable consideration of embedding outcomes into University strategy, and to identify relevant support mechanisms.
- b) **Write CRMS specification** – a preliminary specification was drawn up to outline the principal requirements of the CRMS Marketing functionality, and to help guide the University in making early decisions. It included system features, supplier responsibilities and related timescales.
- c) **Create steering group** – an essential part to progressing the project was to have a dedicated steering group to govern all decision-making and subsequent activity. Members comprised the Vice Chancellor of the University, as well as staff from the Department of Academic Enterprise and a representative from all Academic Schools. The group met on a regular basis throughout the life of the project.
- d) **Identify JISC Champions** – at the same time as establishing a CRMS steering group, a representative of each School/Dept was identified to champion JISC services and to meet as a group on a regular basis.
- e) **Consult on CRMS specification** – following the initial development of the project specification, the steering group used one-to-one discussions with staff to gain feedback on the draft document. A final specification document was then produced.
- f) **Go out to tender** – the University advertised the opportunity for external providers to tender for the installation of the Marketing functionality. A number of potential suppliers were shortlisted as a result and interviewed.
- g) **Hire service provider** – In March 2010, Teesside University employed the services of Green 4 Solutions, a leading CRM supplier based in Leicestershire. The company's ability to utilise Microsoft Dynamics with additional functionality to enhance customer relationships perfectly fitted the objectives of the project.
- h) **Install Marketing functionality** – during spring/summer 2010, Green 4 built and installed the Marketing add-on to Teesside's CRMS. This included system testing and core staff training.
- i) **Pilot phase** – the project team began by implementing the new Marketing functionality within its own department, Academic Enterprise, and specifically within the Enterprise & Business Liaison team. This enabled staff familiarisation, controlled testing and further customisations based on user feedback.
- j) **University-wide implementation** – once the pilot phase was complete, the new Marketing functionality was rolled out across the University. A training and awareness programme was initiated to maximise the use and success of the new system, as well as the documentation of the associated processes and policies.

3.0 The Issues

At the outset of the project, a range of issues were identified which were used to drive objective setting and overall project delivery.

a) Exploiting the CRMS for BCE

A number of issues were highlighted in relation to exploiting the CRMS for BCE. These directly relate to the University's Business Engagement Strategy which sets out a vision to become the UK's leading business facing university through a comprehensive business solutions service.

3.1 Issue One – no structure to exploit CRMS data

Following the development and implementation of the CRMS, a large database had been built and staff users had been trained. However little was being done to exploit the data for Marketing purposes, and only the central commercial Marketing team within the Department for Academic Enterprise was using the system to produce e-campaigns.

3.2 Issue Two – no Marketing coordination

The University's Marketing and Student Recruitment (MSR) department, naturally, prioritised student recruitment and was not able to resource the co-ordination of the institution's overall B2B marketing activity, which was disjointed and isolated within individual Schools. This was a result of project-driven activity funded from independent budgets rather than corporately-driven marketing.

There was potential for the CRMS to bring about a certain level of co-ordination, quality control and brand coherence by recording all Marketing activity in one central location.

3.3 Issue Three – limited CRMS engagement

Despite the full implementation of the CRMS, usage by staff across the University was limited and it was essential to encourage wider and deeper engagement. It was felt that resistance to use may be due to insufficient knowledge, support and encouragement, coupled with a perception of CRM activity generating a greater workload.

Another barrier to CRMS engagement was that many individual teams held their own spreadsheets or databases of external contacts and business activity. Shaping the system to accommodate this information would be crucial in boosting CRMS usage.

3.4 Issue Four – no defined event/course booking system

It was recognised that there was no clear or effective method for business customers to book onto courses and events, resulting in too much time spent issuing invoices, recording responses and chasing bad debt. For the University to operate as a true commercial outfit, and to offer a positive customer experience, a structured book and pay system was required.

b) Promoting JISC at Teesside University

3.5 Issue Five – no JISC engagement strategy

The key issue relating to JISC at Teesside was the lack of any JISC engagement strategy, or co-ordination at VCE level. No mechanism existed to research and review best practice and to alert appropriate Teesside University colleagues.

Furthermore, there were no set procedures or systems in place to identify and fully maximise the use of JISC funding.

4.0 JISC Impact

4.1 Headline Achievements

a) Exploiting the CRMS for BCE

As a result of the Building Capacity project, a number of key achievements have been reached, as detailed below:

Achievement	Details
Commercial Marketing Network Group	Establishment of a Commercial Marketing Network Group, made up of key business and commercially focused staff University-wide. It meets monthly to co-ordinate all CRMS business campaigns.
Process mapping	A new Marketing Campaigns Procedure was developed and mapped out, to provide a standardised structure to all activity. Supporting this are Action Plans, Guides and customer Terms & Conditions.
Enterprise & Business Liaison Co-ordinator	A new job role was created to manage all CRMS Marketing campaigns and to offer support to individual staff members in the campaigns process.
MSR engaged	MSR play a fundamental role in all CRMS marketing activity, as per the Campaigns Procedure, passing all communications for approval before dissemination.
Data Cleansing	Implementation of CRMS Data Cleansing Policy and procedure allows business contacts to check/amend their records and the University to conform to Data Protection legislation.
Evolution of policies	The CRMS has enabled existing policies to be improved and new policies to be developed, including the CRMS Code of Practice and the Access & Security Policy.
E-Marketing software	Green 4 Solutions were contracted to implement a marketing arm to the CRMS. This was the main driver to the entire project.
Template production	Green 4 developed a suite of html branded email templates, to ensure the quality and consistency of marketing campaigns.
Book and pay online	Additional software was purchased from Green 4 to enable business customers to book and pay online for events and short courses. This data fully integrates with the CRMS and its records.
Enhanced CRMS usage	Increased communications with CRMS users has led to deeper usage, cleaner data and up-to-date records.

b) Promoting JISC at Teesside University

A number of JISC Champions have been nominated across the University, one in each area of expertise. Their role is to:

- Maintain awareness of the latest best practice disseminated by JISC
- Review the viability of funding streams, linking to current University strategy
- Build relationships with the appropriate JISC programme manager
- Disseminate their informal intelligence to other interested University colleagues

The JISC Champions meet quarterly or, when funding calls necessitate, in ad hoc meetings. The group co-ordinates responses to funding calls and ensure they fit with University strategy, and it also manages attendance at JISC conferences.

The University's Regional Office team, the University's external funding team, disseminates calls for funding to the JISC Champions and helps to support the bidding process.

The Department for Academic Enterprise provides the support services for the meetings and reports to Vice Chancellor's Executive (VCE) of any issues. VCE are notified of any bidding opportunities which fit with University strategy and of meeting dates should they wish to attend. All bids to JISC are signed off by the VCE.

4.2 Benefits and Beneficiaries

Beneficiary	Benefit
Business Customers	<ul style="list-style-type: none"> • Smoother and more co-ordinated customer experience • Effective book and pay online system
Senior Managers	<ul style="list-style-type: none"> • Easy access to business engagement data and reports
Academic Staff	<ul style="list-style-type: none"> • Improved method to promote business services • Up-to-date information on relevant business projects
CRMS Users	<ul style="list-style-type: none"> • Quality systems and support to produce branded and co-ordinated Marketing campaigns • Data cleansing procedure saves staff time on having to update customer records • Reduced risk of non-compliance with DPA and Privacy and Electronic Communications Regulations (PECR)
Business-facing staff	<ul style="list-style-type: none"> • Provision of evidence to support the Putting the Customer First quality standard, particularly with regard to its Marketing element.
Other HEI's	<ul style="list-style-type: none"> • Access to tried and tested CRMS policies, processes and practices

4.3 Direct Use of JISC Support

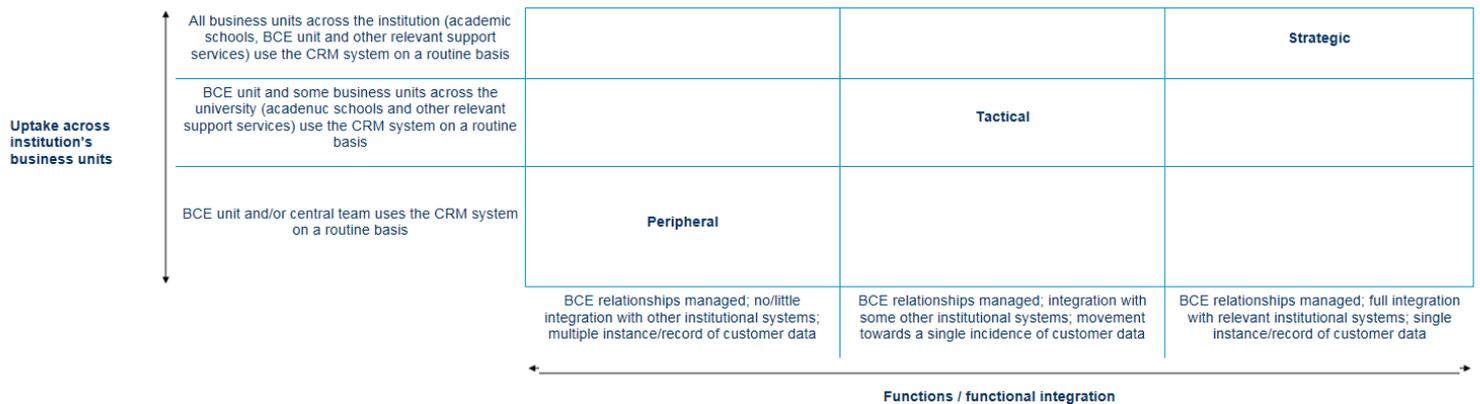
A range of CRM resources and artefacts from JISC were directly drawn upon to aid the completion of the project.

- **Needs Assessment** – the information provided on 'the needs of HEIs and FECs' provided a sound basis to produce the initial specification for the CRMS Marketing add-on.

Key considerations included:

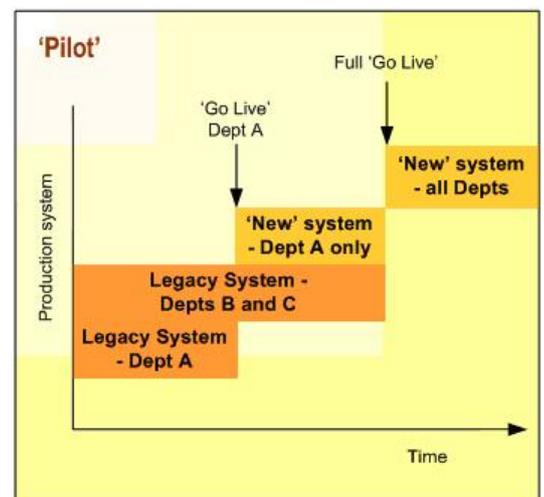
- Assessing existing weaknesses
- Required software features and technical support
- Training needs and testing mechanisms
- Measuring progress and success

- **Defining CRMS Integration** – the model below proved valuable in assessing where Teesside University sat at the outset of the project with regard to CRMS usage. The JISC resource provided details to help the project team move towards a more strategic level of usage across the institution.



- **Implementation Models** – the project team used JISC's concept on implementation models to determine how the new Marketing practices would be disseminated across the University.

Of the four models presented, the 'Pilot' approach was chosen, as this is described as holding the least risk and being the most economical.



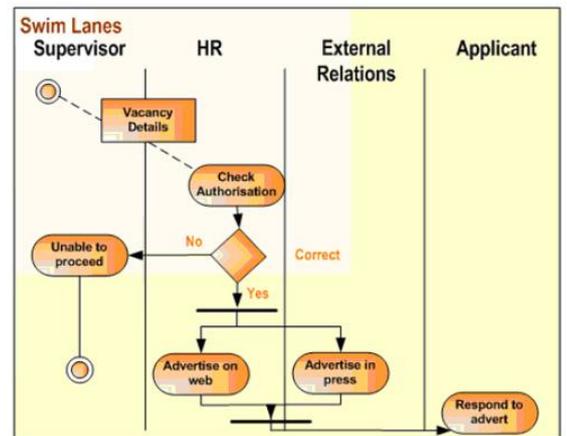
- **Change Management** – it is relatively straightforward to consider the required change in processes to implement a new system, but it can be a challenge to tie this in with the necessary changes in leadership, culture and strategy. JISC's tool below was therefore useful in incorporating issues such as the willingness of senior managers, the clarity of staff roles/structure and degree of co-operation amongst staff.



- **Process Mapping** – the guidance provided by JISC on process mapping was directly used by Teesside University in order to help evaluate, communicate and document various business processes.

Such mapping diagrams now form the basis of all business engagement procedure documents.

The example below is used to illustrate the University’s new Marketing Campaigns Procedure, as developed within the Building Capacity project.



Marketing Campaigns Procedure

Area	Business Liaison Team	Marketing Team	CRMS Team
Devise & agree campaign content and target market			
	Plan and support the development of campaign resources & marketing lists		
			Agree execution times
Compile marketing message and targeted lists			
	Compile communication template and create campaign activity		
		Approve materials	
			Execute
Monitor and manage campaign responses			

5.0 New Capabilities

A number of new capabilities have been developed by the University since the completion of the project.

a) Exploiting the CRMS for BCE

5.1 Commercial Marketing Network

The development of a Commercial Marketing Network has brought about University-wide ownership of Marketing activity, and enabled the institution to move in an integrated and co-ordinated fashion.

5.2 Campaign Evaluation

The CRMS has not only enabled the University to distribute targeted email campaigns, it has also provided the capability to effectively evaluate the success and impact of these campaigns.

The purpose of the evaluation is based on a rounded approach that covers inputs, outputs, and outcomes so as learning can happen to make the planning for future campaigns smarter and economically based. It also enables the accumulation of market intelligence to inform future Marketing strategy.

5.3 Template Management

The quality of Teesside University's Marketing campaigns is further facilitated by knowledge of and access to its library of pre-built and professionally developed email communication templates.

The templates ensure corporate branding guidelines are adhered to, whilst offering the flexibility to incorporate the required messages.

b) Promoting JISC at Teesside University

It is still very early to interpret the full impact of the project upon the promotion of JISC within the University, and to assess the level of capabilities developed as a result. This will be closely monitored and reported on in due course.

6.0 Lessons Learned

Following the execution of the project, a number of key lessons have been learned.

a) Exploiting the CRMS for BCE

Start Small – the decision to pilot the new Marketing element of the CRMS within one department proved to be extremely worthwhile. It enabled the project team to test the new system, gain feedback, refine it and then test again. This was certainly a case of not biting off more that you can chew.

Get the fit right with other systems – a decision needs to be made before CRMS implementation as to whether it will be integrated with or isolated from other software systems such as student databases or finance systems. Although there are great benefits to merging such systems, there is also a cost with regard to staff time, technical adaptations, training needs and the required behavioural change. In the case of this project the alternative was to ‘piggy back’ on the MSR marketing system used for student recruitment. This was not a viable proposition but the University is considering some integration in the long term.

Wide consultation – before full implementation of the system, it is necessary to consult with users across the institution for feedback and ideas. This will help structure the final specification of work to be undertaken.

Emphasis on training – the key area in which to invest time and budgets was found to be training and re-training. All staff undertake specialist training in order to gain a CRMS license, and this is followed up with bespoke training where necessary, refresher training and one-to-one support on specific functions of the system. This ongoing training procedure builds confidence amongst users and enables continual reinforcement and reassurance to keep using the system. It is however, very resource intensive.

Culture change – to maximise take-up of the new system, a change in culture is inevitably required, however tying this into strategic objectives is a significant driver for this change. Embedding new processes and procedures into business and Marketing strategy at Teesside has facilitated changes in behaviour and working practices to aid the exploitation of the CRMS in business engagement.

Drive from the top – A member of the Vice Chancellor’s Executive of Teesside University was made chair of the steering group, in order to maximise the impact of the project. This enabled project activity and communication to be driven from the very top of the organisational structure.

Demonstrate benefits – it is important to show staff that using the CRMS for marketing dramatically increases a campaign’s quality, impact and measurability, and that it avoids audience saturation from other communications.

Sharing best practice – sharing best practice University-wide has proved crucial to the success of the campaigns facility, and the development of the Commercial Marketing Network has facilitated this. Being able to view examples of other

campaigns, and share thoughts with other members of staff responsible for marketing activity have proven to be invaluable in the CRMS Marketing process.

b) Promoting JISC at Teesside University

Control vs Inclusion – the University has recognised that there is a fine balance between central control and inclusion for all. It has therefore been necessary to involve all relevant staff in raising awareness of JISC and its support opportunities, whilst implementing structures and procedures to maintain the necessary controls.

A further lesson learned here is that despite the existence of these carefully planned structures, there will always be those who attempt to operate outside these controls. In such cases, it is necessary to work on an individual level to promote the benefits of working within the corporate procedures.

7.0 Disadvantages and Drawbacks

a) Exploiting the CRMS for BCE

One disadvantage identified to date with regard to increasing business engagement activity is the issue of the CRMS not being able to work alongside the University's student database. The two systems use entirely different approaches, which can give rise to problems when sending communications to both business customers and those classed as individual students.

Secondly, the capability the marketing function provides in building corporately branded and approved communications can inevitably demand longer lead times to plan and implement the campaign, as opposed to producing it on an uncoordinated and ad-hoc basis. User training and education has helped to address this.

Finally, the very fact that Teesside University is a CRM pioneer in Higher Education has limited the platforms available from JISC to draw assistance and best practice. It has only been more recently that CRM has come on to the JISC radar.

b) Promoting JISC at Teesside University

The value of JISC Champions has been found at times to be limited, as they cannot always be relied upon to cascade information. Factors contributing to this are the possibility of some Champions being chosen rather than volunteered, and the sense of it being an extra duty upon an already demanding workload.

The solution is to give Champions the tools, training and discussion arenas required to fulfil their role, and to provide improved communications strategies, routes and media.

8.0 Future and Sustainability of the Project

It is Teesside University's intention to continue to operate the systems and procedures created through the implementation of the project, and this will be achieved by taking a number of measures. Resources to continue to provide the central co-ordination have been approved in the 2010-14 staffing structure for the Department of Academic Enterprise.

a) Exploiting the CRMS for BCE

The Commercial Marketing Network Group will continue to meet on a monthly basis to ensure the co-ordination of all CRMS Marketing activity. This will also provide a forum for users of the campaign functionality to suggest ongoing improvements and system developments in order to adapt to customer needs.

The University will continue to promote the CRMS to existing and potential users, supporting staff in its exploitation to engage with business customers.

b) Promoting JISC at Teesside University

In order to continually promote the JISC Champions system, Champions meetings will continue to take place on a quarterly basis. This will provide an opportunity for the process to be regularly discussed and improved.

9.0 Summary and Reflection

To accurately reflect upon the achievement and success of the project, the original CRMS issues shall be re-addressed.

a) Exploiting the CRMS for BCE

9.1 Issue One – no structure to exploit CRMS data

The combination of the new CRMS Marketing add-on, a Marketing Campaigns Procedure, the new Enterprise & Business Liaison Co-ordinator and the creation of the Commercial Marketing Network Group has provided a strong and reliable structure to exploit CRMS data for marketing purposes.

All Academic Schools have now used the Marketing functionality of the CRMS, although the level to which this has been integrated within normal Marketing practices does vary. The Department of Academic Enterprise will continue to support those Schools still on the fringe of full integration, in order to move towards strategic adoption of CRMS marketing across the University.

9.2 Issue Two – no Marketing coordination

There is now a clear procedure in place for all business-facing staff to launch a promotional email campaign. This is co-ordinated by the Department of Academic Enterprise, and specifically by the Enterprise & Business Liaison Co-ordinator, with full involvement from the MSR department.

The use of professionally designed email templates ensures the quality and consistency of communications, and maintains the strength of the Teesside University brand.

The establishment of the Commercial Marketing Network Group ensures that all University campaigns are delivered in a co-ordinated way, with no one target audience being saturated with multiple communications at any one time.

9.3 Issue Three – limited CRMS engagement

Generic CRMS engagement has been addressed via the short-term employment of a CRM Support Officer, in order to assist, educate, train and work with users on an individual and bespoke basis. Regular CRMS User Group meetings support this work, as well as the creation of a CRMS Communications Strategy, a CRMS newsletter and an online information point. This has led to wider and deeper usage of the CRMS, also enabling staff to be exposed to the system's Marketing capabilities.

9.4 Issue Four – no defined event/course booking system

A fully integrated and operational book and pay online system is now in place, incorporating a link into email communications to register and pay for business events or short courses.

The data captured by respondents feeds directly into the CRMS, automatically creating new contact records where appropriate, and adding their name onto the event/course registration list.

The book and pay online element of the campaign is also managed by the Enterprise & Business Liaison Co-ordinator, and is simply an additional technical step within the development of the email campaign.

b) Promoting JISC at Teesside University

9.5 Issue Five – no JISC engagement strategy

A clear procedure and strategy is now in place to ensure awareness of JISC services and opportunities, using the Champions system. Further time is needed to assess the full impact of this element of the project, and careful monitoring is required to maximise Champion engagement and motivation.

10.0 Appendices

10.1 JISC Toolkit

10.2 Presentation from dissemination event